

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty Kruthers, Heather H. (for Public Guardian – Trustee/Petitioner)

Second Account Current and Report of Trustee; Petition for Allowance of Compensation to Trustee and Attorney

Age: 23			PUBLIC GUARDIAN, Trustee appointed	NEEDS/PROBLEMS/COMMENTS:
			by Minute Order on 4/12/2012, is	
			Petitioner.	
			Account period: 04/13/13 - 08/12/14	
Cont. from			Accounting - \$36,797.51	
	Aff.Sub.Wit.		Beginning POH - \$7,852.48	
✓	Verified		Ending POH - \$34,340.71 (\$5,397.23 is cash)	
	Inventory		(\$5,577.25 is Casti)	
	PTC		Trustee - \$195.60 (1.5	
	Not.Cred.		staff hours @ \$76/hr. and .85 Deputy	
✓	Notice of		hours @ \$96/hr.)	
	Hrg			
✓	Aff.Mail	w/	Attorney - \$450.00 (3	
	Aff.Pub.		hours @ \$150/hr.)	
	Sp.Ntc.		Petitioner prays for an Order:	
	Pers.Serv.		, , , , , , , , , , , , , , , , , , ,	
	Conf.		 Approving, allowing and settling 	
	Screen		the Second Account; and	
	Letters		Authorizing the Trustee and atterney face and	
	Duties/Supp		attorney fees and compensation.	
	Objections		compensation.	
	Video			
	Receipt			
	CI Report			
<u> </u>	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 10/15/14
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 1 – Soto

2

McCloskey, Daniel T.

(1) First and Final Report of Administrator on Waiver of Account and Petition for its Settlement; (2) for Allowance of Statutory and Extraordinary Fees to Attorney for Services; and (3) for Order for Final Distribution Pursuant to Probate Code 3600 et. seq.

DC	DD: 3/31/10	JOSEPH WILLIAM MARTIN, Administrator,	NEEDS/PROBLEMS/COMMENTS:
		is petitioner.	Continued from 9/8/14.
		1, , , , ,	Committee nom 7/8/14.
		Accounting is waived.	1 It come a greath at the classic b \\/
Со	ont. from 082514	I & A - \$125,873.74	It appears that the Joseph W. Martin Irrevocable Trust
09	0814	POH - \$127,424.94	established on 1/16/14 is not a
	Aff.Sub.Wit.		valid "special needs" trust. The
✓	Verified	Administrator - waives	requirements for creation of a
✓	Inventory	Attorney - \$4,776.22	special needs trust are that the beneficiary must be under the
1	PTC	(statutory)	age of 65 at the time of the trust's
		Attornovy/o	creation. Mr. Martin is 86. (Title 42
✓	Not.Cred.	Attorney x/o - \$9,100.00 (40.75 hours @ \$100 – 250/hr for services	United States Code section 1396p(d)(4)(A)).
✓	Notice of W/	in connection with the civil litigation	13/00(4)(4)(/).
	Hrg	and creation of the special needs trust)	
✓	Aff.Mail	01.004.00	2. Petition requests the distribution
	Aff.Pub.	Costs - \$1,304.32 (probate Referee, publication, certified	to the Joseph W. Martin
	Sp.Ntc.	copies)	Irrevocable Special Needs Trust, dated 1/16/14. The trust
	Pers.Serv.		attached to the petition is
	Conf.	Petitioner states he established the	entitled the Joseph W. Martin
-	Screen	JOSEPH W. MARTIN IRREVOCABLE	Irrevocable Trust established on
✓	Letters 4/2/13	SPECIAL NEEDS TRUST, ("SNT") dated 1/16/14, Donald Fischer, trustee. The	1/16/14 with no mention of a special needs trust.
	Duties/Supp	SNT currently contains proceeds from	
	Objections	the settlement of the civil litigation by	Please see additional page
	Video	order of the Honorable Kristi Culver-	
	Receipt	Kapetan in the matter entitled Joseph	
<u> </u>	CI Report 9202	W. Martin v. Mary Quin, et. al, case no.	
<u> </u>		12CECG03130 filed on 4/2/14. Petitioner requests the court take	
✓	Order	judicial notice of the order.	
	Aff. Posting	·	Reviewed by: KT
 	Status Rpt	Please see additional page	Reviewed on: 10/15/14
	UCCJEA	4	Updates:
_	Citation FTB Notice	-	Recommendation: File 2 - Martin
✓	FIB NOTICE		riie 2 - Martin
			2

2 Theresa Gutierrez Martin (Estate)

Case No. 13CEPR00054

Page 2

Petitioner request the assets of the estate be distributed to Donald E. Fischer, Trustee of the Joseph W. Martin Irrevocable Special Needs Trust dated 1/16/14.

NEEDS/PROBLEMS/COMMENTS (cont.):

3. Extra ordinary fee requests appear to include attorney services that benefited the administrator, Joseph Martin, personally and not the estate. For instance, Mr. McCloskey states he assisted Mr. Martin in a civil case for financial elder abuse against his daughter, Mary J. Quin entitled Joseph W. Martin v Mary J. Quin, case no. 12CECG03130. The action sought to recover assets Mr. Martin alleged were fraudulently taken by his daughter, Mary J. Quin. Mr. Martin was represented by Attorney Babette Fischer in the civil matter and not Mr. McCloskey. Mr. McCloskey also states he assisted in the creation of the Special Needs Trust for Mr. Martin. The special needs trust would be solely for the benefit of Mr. Martin and not for the benefit of the estate. In addition, there are questions regarding the validity of the Special Needs Trust. It appears any attorney fees incurred by the civil case or for Mr. Martin personally should be recovered from Mr. Martin personally outside of the estate. California Rules of Court, Rule 7.702(3) requires the declarant to show the benefit of the services to the estate. - Declaration of Attorney Daniel T. McCloskey filed on 8/15/14 states he feels the extraordinary fees are justified due to the unusual circumstances presented by the case, including but not limited to; preparation, filing and related actions to create the Special Needs Trust; preparation and filing and prosecution of the Petition to Determine Title; protracted civil litigation regarding the Petition to Determine Title and Petitioner's physical incapacity and mobility issues after his fall requiring travel to and from the convalescent home and hospital; that the misconduct alleged by his daughter occurred in 2010 and that it was his only daughter, a licensed attorney, who agaressively defended against the complaint and petition.

Status Report filed on 10/10/14 states at the hearing on 9/8/14 the court determined that the Joseph W. Martin Irrevocable Special Needs Trust was not a valid special needs trust pursuant to Title 42 USC §1396p(d)(4)(A), as Mr. Martin was over the age of 65 when the trust was created.

Mr. McCloskey states he has been in contact with the Special Needs Trust Division of the California Department of Health Services (DHS) regarding establishment of a special needs trust.

Mr. McCloskey states he was advised that DHS would require a special needs trust would for Mr. Martin provided it was administered by a professional fiduciary working for a non-profit organization. Mr. McCloskey's office contacted the Good Shepard Fund in San Jose and Golden State Pooled Trust in Napa, requesting their assistance in preparation and administration of a special needs trust on behalf of Mr. Martin. To date Mr. McCloskey states he has not received any response and will be following up on the selection of an appropriate trustee and special needs trust.

Mr. McCloskey states it is the Administrator's intention, once a non-profit fiduciary has been selected to petition the court for a revocation of the special needs trust entitled the Joseph W. Martin Irrevocable Trust dated, January 16, 2014, and request approval of a special needs trust by a non-profit fiduciary.

The Administrator, Joseph W. Martin, continues to reside in an assisted living facility in Fresno and has physical mobility issues that make it very hard, if not impossible, to attend the hearing. The Administrator requests that he be excused from attending the status hearing.

The Balzer Family Trust dated December 31, 1990 Case No. 14CEPR00759 3 Atty

Gromis, David Paul (for Petitioner Jerold B. Balzer)

Petition for Determination of Property belonging to Trust

(prob.c850,15660, and 17200)

Walter J. Balzer DOD: 10-22-99			JEROLD B. BALZER, Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Tiena L. Balzer DOD: 7-11-10			Petitioner states Walter B. Balzer and Tiena L. Balzer, husband and wife, established the Balzer Family Trust on 12-31-90. Walter J. Balzer died 10-22-99. As the surviving trustor, Tiena L. Balzer had 100% access and control over all assets of the trust and on 3-26-10 signed a Modification and Complete Restatement	
	Aff.Sub.Wit.		of Declaration of Trust known as the Balzer Family Trust (attached).	
Ě	Verified		nosi (anachea).	
-	Inventory		Petitioner states that pursuant to Exhibit A of the	
-	PTC		trust, Tiena L. Balzer transferred, or intended to	
<u> </u>	Not.Cred.		transfer, certain assets to her name as trustee of the	
~	Notice of Hrg		Balzer Family Trust, including a certain Charles Schwab account xx8323.	
~	Aff.Mail	W		
	Aff.Pub.		Titles to all assets were in fact transferred from Tiena	
	Sp.Ntc.		L. Balzer's individual name to Tiena L. Balzer's name as Trustee of the trust, except for the Charles	
	Pers.Serv.		Schwab account, which remains titled in her name	
	Conf.		individually. See attached statement.	
	Screen		,	
	Letters		Petitioner states Tiena L. Balzer was a sophisticated	
	Duties/Supp		investor and understood the value of a revocable	
	Objections		living trust. For whatever reason, she inadvertently failed to re-register title to the Charles Schwab	
	Video		account to her name as trustee.	
	Receipt			
	CI Report		The Charles Schwab account is mentioned in the	
	9202		trust's Exhibit A, which shows the trustor's intent to	
~	Order		include the account as part of the trust.	
	Aff. Posting		In order to allow the Charles Schwab account to be	Reviewed by: skc
	Status Rpt		administered in the trust without the necessity of	Reviewed on: 10-15-14
	UCCJEA		probate of the estate of Tiena L. Balzer, Petitioner	Updates:
-	Citation FTB Notice		requests an order confirming and determining that	Recommendation:
			Tiena L. Balzer's 100% interest in the Charles Schwab account is owned by Petitioner as trustee of the trust.	File 3 – Belzer
			See Points and Authorities re Estate of Heggstad, Probate Code §850(a)(3)(B).	

Neilson, Bruce A. (for Erica Hernandez – Administrator)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and or Failure to File a First Account or Petition for Final Distribution

DOD: 9-15-04		ERICA HERNANDEZ, daughter, was	NEEDS/PROBLEMS/COMMENTS:
		appointed as Administrator with Full	0 14 14 5 00 14
		IAEA without bond and Letters issued on 5-20-05.	Continued from 2-14-14, 5-30-14, 7-21-14, 9-29-14
		3-20-03.	7-21-14, 7-27-14
Cont. from 02141	14,	The original petition alleged personal	Minute Order 9-29-14: Mr. Neilson
053014, 072114,		property valued at \$2,000.00 and real	reports he cannot locate his
092914		property valued at \$270,000.00,	petitioner. Status report needed.
Aff.Sub.Wit.		encumbered for \$45,000.00.	A = -6.10.15.14 m = th: m = 6 mth = m h = n
Verified		However, no Inventory and Appraisal	As of 10-15-14, nothing further has been filed.
Inventory		was ever filed pursuant to Probate	been med.
PTC		Code §8800.	Need Inventory and Appraisal
Not.Cred.		j	pursuant to Probate Code §8800
Notice of		No accounting or petition for final	and accounting and petition for
Hrg		distribution was ever filed pursuant to	final distribution pursuant to
Aff.Mail		Probate Code §12200.	Probate Code §12200, or verified
Aff.Pub.		The Court set this status hearing for	written status report pursuant to local rules.
Sp.Ntc.		failure to file Inventory and Appraisal	local foles.
Pers.Serv.		and failure to file accounting or petition	Note: The decedent's intestate heirs
Conf.		for final distribution. Both attorney and	are his three children: Erica
Screen		personal representative are ordered to	Hernandez, Cristobal Hernandez, and
Letters		appear.	Andrea Hernandez.
Duties/Supp		Nation of Status Hooring was mailed to	
Objections		Notice of Status Hearing was mailed to Attorney Bruce A. Neilson and	
Video		Administrator Erica Hernandez on	
Receipt		11-21-13.	
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: skc
Status Rpt			Reviewed on: 10-15-14
UCCJEA	-		Updates:
Citation			Recommendation:
FTB Notice			File 4 – Hernandez
		-	4

Neilson, Bruce A. (for Administrators Lycester Wills III and Thelma French)

Probate Status Hearing Re: Failure to File an Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 5/30/07	LYCESTER WILLS, III and THELMA FRENCH	NEEDS/PROBLEMS/COMMENTS:
	were appointed Co-Administrators with	
	full IAEA authority and without bond on	Continued from 9/29/14.
	5/22/2007.	1 Noodingsonkon and approximate
Cont. from 041814,	Letters issued 5/22/2007.	Need inventory and appraisal and first account or petition for
060614, 072114,	Letters issued 5/22/2007.	final distribution or current written
092914	I & A was due 9/22/2007.	status report pursuant to Local
Aff.Sub.Wit.	1	Rule 7.5 which states in all matters
Verified	First account or petition for final	set for status hearing verified
Inventory	distribution was due 5/22/2008.	status reports must be filed no
PTC	Notice of Status Heaving Augus posited to	later than 10 days before the
Not.Cred.	Notice of Status Hearing was mailed to attorney Bruce A. Neilson on 2/5/2014.	hearing. Status Reports must comply with the applicable code
Notice of	GITOTHEY BIOCE A. NEISON ON 2/3/2014.	requirements. Notice of the status
Hrg		hearing, together with a copy of
Aff.Mail		the Status Report shall be served
Aff.Pub.		on all necessary parties.
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report	_	
9202		
Order	1	
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 10/15/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 5 – Wills
		5

Case No. 13CEPR00686

Mary Margaret Walsh (Estate)

Neilson, Bruce A. (for John J. Walsh, Jr. and David T. Walsh – Co-Executors/Petitioners)

First and Final Account and Report of Executor and Petition for Its Settlement, for
Allowance of Compensation for Ordinary and Extraordinary Services and for Final
Distribution (Prob. C. 10800, 10801, 10951, 11640)

DOD: 05/29/13		JOHN J. WALSH and DAVID T. WALSH,		T. WALSH,	NEEDS/PROBLEMS/COMMENTS:	
		Co-Executors, are Petitioners.		ers.		
					0-10-11	CONTINUED FROM 08/18/14
			Account period: 09/12/13 - 07/07/14		- 07/07/14	Minute Order from 08/18/14 states:
Co	nt. from 08181	4	Accounting	_	\$200,124.29	The court sets this matter for 60 days and not 90 days upon the
	Aff.Sub.Wit.		Reginning POH	-	\$200,124.27	representation of counsel that there
—	Verified		Beginning POH Ending POH	_	\$95,854.06	are no taxes due.
√	Inventory		(all cash)		*	
<u>,</u>	PTC					Notice of Administration of the
<u>,</u>			Executors	-	waived	Estate was mailed to the
V ✓	Not.Cred.					Franchise Tax Board on 08/15/14.
`	Notice of		Attorney	-	\$2,531.25	90 days from 08/15/14 is
√	Hrg	/	(less than statutory)			11/13/14. As of 10/15/14, nothing further has been filed in
Ě	Aff.Mail	w/	Closing	_	\$500.00	this matter.
—	Aff.Pub.		0.031119		φοσο.σσ	This manor.
l <u></u>	Sp.Ntc.		Distribution, pursuar	nt to de	cedent's will,	
	Pers.Serv.		is to:			
	Conf.					
	Screen		, and the second		\$9,282.28	
	Letters 09/12	/13	William E. Walsh	-	\$9,282.28	
	Duties/Supp		Maureen A. Walsh Michael R. Walsh		\$9,282.28 \$9,282.28	
	Objections		Kathleen A. Walsh		\$9,282.28	
	Video		Kevin F. Walsh		\$9,282.28	
	Receipt		Patricia M. Bonnel		\$9,282.28	
	CI Report		Linda M. Anderson	-	\$9,282.28	
✓	9202				\$9,282.28	
✓	Order		David T. Walsh	-	\$9,282.29	
	Aff. Posting					Reviewed by: JF
	Status Rpt					Reviewed on: 10/15/14
	UCCJEA					Updates:
	Citation					Recommendation:
✓	FTB Notice					File 7 – Walsh
						7

Mele, James J. (for Petitioner Paula Vaughn)

(1) First and Final Account and Petition for Settlement of First and Final Account and (2) Final Distribution and (3) for Allowance of Compensation for Ordinary Services for Petitioner and Petitioner's Attorney

DC	DD: 4/6/1991	PAULA VAUGHN, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
	75. 4 / 0/ 1771	petitioner.	NEEDS/TROBLEMS/COMMENTS.
		Account period: 4/28/14 - 8/31/14	Itemization of costs includes \$435.00 on 11/20/14 for the filing of an Amended Petition. There is
Cont. from		Accounting - \$60,000.00	no fee for the filing of an
	Aff.Sub.Wit.	Beginning POH - \$60,000.00	amended petition. In addition
1	Verified	Ending POH - \$35,539.64	there is no record in the court's
✓	Inventory	Administrator - waives	case management system that a filing fee was paid for the
1	PTC	Attorney - \$2,080.00	amended petition.
	Not.Cred.	(statutory, to be paid from the	2. Itemization of costs includes \$350
✓		Administrator's share of the estate per	on 10/9/14 and another \$350 on
✓	Notice of	agreement of the heirs.)	11/25/14 for publication costs.
	Hrg		The attorney initially published
✓	Aff.Mail W/	Costs - \$2,105.00	the Notice of Hearing and not
	Aff.Pub.	(see notes #1 and 2 – costs are to be paid from the Administrator's share of	the Notice of Petition to
✓	Sp.Ntc. W/	the estate per agreement of the heirs.)	Administer the Estate as required. This resulted in the additional
	Pers.Serv.	2	\$350 charge to correctly publish
	Conf. Screen	Distribution, pursuant to intestate succession and agreement of the	the Notice of Petition to Administer the Estate. It appears
✓	Letters 4/28/14	heirs, is to:	that the client should not be
	Duties/Supp	5 1 1/ 2 5 5 6 6 6	charged for the mistake of the
	Objections	Paula Vaughn - \$13,584.82	attorney.
	Video Receipt	DeAndre Vaughn - \$17,769.80	Therefore the costs should be
	CI Report		\$1,320.00 and Paula's share of the estate should be \$14,369.82.
✓	9202		estate should be \$14,507.02.
✓	Order		
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 10/15/14
	UCCJEA		Updates:
	Citation		Recommendation:
✓	FTB Notice		File 9 – Vaughn
		и	9

10 Florence I. Caglia Family Trust (Trust)

Case No. 14CEPR00362

Atty Schrimp, Roger M. (of Modesto, CA, for Trustees Richard M. Caglia and Sally M. Caglia)

Atty Torres-Silva, Bernadette (Pro Per Beneficiary – Objector)

Atty Helon, Marvin T. (for Beneficiaries Mary Ann Torres and Bernadette Boyle)

	Minute Order 9-15-14 (Settlement Conf.):	NEEDS/PROBLEMS/COMMENTS:
	Parties have resolved issues and are	
	working on agreement to be filed. Set on	
	10-20-14 for status.	Need agreement or written
		status report pursuant to Local Rule 7.5.
Aff.Sub.Wit.		Local Rule 7.5.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 10-15-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10 – Caglia FT

11 Frank S. Caglia Survivor's Trust (Trust)

Case No. 14CEPR00363

Atty Schrimp, Roger M. (of Modesto, CA, for Trustees Richard M. Caglia and Sally M. Caglia)

Atty Torres-Silva, Bernadette (Pro Per Beneficiary – Objector)

Atty Helon, Marvin T. (for Beneficiaries Mary Ann Torres and Bernadette Boyle)

	Minute Order 9-15-14 (Settlement Conf.):	NEEDS/PROBLEMS/COMMENTS:
	Parties have resolved issues and are	
	working on agreement to be filed. Set on	
	10-20-14 for status.	Need agreement or written
		status report pursuant to Local Rule 7.5.
Aff.Sub.Wit.		Local Role 7.5.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 10-15-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 11 – Caglia ST

Florence I. Caglia Non-Exempt Marital Trust

Case No. 14CEPR00364

Schrimp, Roger M. (of Modesto, CA, for Trustees Richard M. Caglia and Sally M. Caglia)

Atty

Torres-Silva, Bernadette (Pro Per Beneficiary – Objector)

Helon, Marvin T. (for Beneficiaries Mary Ann Torres and Bernadette Boyle)

	Minute Order 0 15 14 (Settlement Conf.)	NEEDS/PROBLEMS/COMMENTS:
	Minute Order 9-15-14 (Settlement Conf.):	NEEDS/PROBLEMS/COMMENTS:
	Parties have resolved issues and are	
	working on agreement to be filed. Set on 10-20-14 for status.	Need agreement or written
	10-20-14 for status.	status report pursuant to
		Local Rule 7.5.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 10-15-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12 – Caglia NEMT

Florence I. Caglia Exempt Marital Trust (Trust)

Case No. 14CEPR00365

Schrimp, Roger M. (of Modesto, CA, for Trustees Richard M. Caglia and Sally M. Caglia)

Atty

Torres-Silva, Bernadette (Pro Per Beneficiary – Objector)

Helon, Marvin T. (for Beneficiaries Mary Ann Torres and Bernadette Boyle)

	Minute Order 9-15-14 (Settlement Conf.):	NEEDS/PROBLEMS/COMMENTS:
	Parties have resolved issues and are	NLLD3/FROBLEMIS/COMMENIS.
	working on agreement to be filed. Set on	
	10-20-14 for status.	1. Need agreement or written
	10-20-14 101 310103.	status report pursuant to
		Local Rule 7.5.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 10-15-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 – Caglia EMT

Margaret Connie Magallanes (Estate)

14

Atty

Case No. 14CEPR00578

Celaya, Anthony G. (of Napa, CA, for Petitioner Felix C. Magallanes)
Petition for Probate of Will and for Letters Testamentary; Authorization to

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

Petitioner and requests appointment as Administrator with Full IAEA without bond. Cont. from 081114 operations and instruction with Full IAEA without bond. All heirs waive bond. All heirs waive bond. Full IAEA – Need publication PTC Inventory PTC Not.Cred. V Notice of Hrg Aff.Nail Aff.Pub. X Sp.Ntc. Conf. Screen V Letters V Letters V Duties/Supp Objections Video Receipt CI Report P 202 Y Order Aff. Posting Status Rpt UCCJEA Citation Administrator with Full IAEA without bond. All heirs waive bond. All heirs waive bond. Full IAEA – Need publication Decedent died intestate Residence: Clovis Publication – Need publication Estimated value of estate: Real property: \$650,000.00 Note: if the petition is granted status hearings will be set as follows: - Monday 2-23-15 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rue 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: skc Reviewed on: 10-15-14 Updates: Recommendation: File 14 – Magallanes	DOD: 11-5-13			FELIX C. MAGALLANES, Spouse, is	NEEDS/PROBLEMS/COMMENTS:
Dond. All heirs waive bond. All heirs waive bond.				· · · · · · · · · · · · · · · · · · ·	Carlinuad from 0.1.14.0.20.14
Aff. Sub. Wit. Full IAEA – Need publication Decedent died intestate					Continued from 8-1-14, 9-29-14
Aff. Sub. Wit. Full IAEA – Need publication Decedent died intestate				bond.	Minute Order 9-29-14: Publication
Aff. Sub. Wit. Full IAEA – Need publication Decedent died intestate Inventory PTC Notice of Hrg Estimated value of estate: Real property: \$650,000.00 Probate Referee: Steven Diebert Notices of Screen Value of Pers. Serv. Conf. Screen Value of Pers. Serv. Probate Referee: Steven Diebert Pusuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: skc Reviewed on: 10-15-14 Updates: Recommendation: Recom	Co	nt. from 081114	ļ	All heirs waive hand	
Verified Inventory PTC Not.Cred. Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Viletters Viletters Vileters Vildeo Receipt CI Report 9202 Violant Aff. Posting Status Rpt UCCJEA Citation Verified Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearings will be set as follows: Note: If the petition is granted status hearing	092	914		7 th Field Walve Beria.	10-20-14.
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Production Probate Code §8120.		Inventory		Decedent died intestate	1 Novel make all an armount to
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Y Notice of Hrg Image: Note: If the petition is granted status hearings will be set as follows: ✓ Aff.Mail X Aff.Pub. X Sp.Ntc. In Dept. 303 for the filing of the inventory and appraisal and Pers.Serv. In Dept. 303 for the filing of the first account and final distribution. ✓ Duties/Supp Pusuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Video Receipt Pago2 ✓ Order Aff. Posting Aff. Posting Reviewed by: skc Status Rpt Reviewed on: 10-15-14 Updates: UCCJEA Citation Recommendation:		Not.Cred.			
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Aff. Pub. X Sp. Ntc. Pers. Serv. Conf. Screen Duttes/Supp Objections Video Receipt CI Report 9202 Video Aff. Posting Aff. Posting Status Rpt UCC JEA UCC JEA Citation Real property: \$650,000.00 *Monday 2-23-15 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and *Monday, 2-22-16 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: skc Reviewed on: 10-15-14 Updates: Recommendation:		Hrg		Estimated value of estate:	<u> </u>
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Status Rpt UCCJEA Uitation Reviewed on: 10-15-14 Updates: Recommendation:	~				
UCCJEA Updates: Citation Recommendation:					
Citation Recommendation:		•			
					-
FTB Notice					
		FTB Notice			File 14 – Magallanes

Case No. 14CEPR00652

Walters, Jennifer L. (for Petitioners Cathleen Wharton and Danny Wharton, Jr.)
Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			TEMP EXPIRES 9-29-14	NEEDS/PROBLEMS/COMMENTS:
			CATHLEEN WHARTON and DANNY WHARTON, JR., paternal cousins, are Petitioners.	Continued from 9-29-14. The following issue remains noted:
CO >	nt. from 092914 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen	w	Father: SHAWN MILTON - Consents and waives notice Mother: AMANDA STIVERS - Diligence found at hearing 8-7-14 Paternal Grandfather: Wendell Milton - Served by mail on 7-29-14 Paternal Grandmother: Dorothy Milton - Served by mail on 7-29-14 Maternal Grandfather: Herman Demick - Served by mail on 7-29-14 Maternal Grandmother: Shari Stivers (Purkey) - Served by mail on 7-29-14	1. The Court found diligence as to the mother for the temporary guardianship at hearing on 8-7-14. However, at this time, the Court may require clarification as to whether additional efforts have been made to locate and serve the mother with Notice of Hearing and a copy of the petition for this general hearing for permanent guardianship per Probate Code §1511.
>	Letters Duties/Supp Objections Video Receipt CI Report		Siblings: Blake Brier, Havenlee Peace Brier, Cerenity Diann Milton, Aydha Lee Milton, Charizzma Brier, Travis Milton - Served by mail on 7-29-14 Petitioners state they have had custody of	
> > >	CI Report Clearances Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Petitioners state they have had custody of Harmony since she was six months old. The father was previously incarcerated and Petitioners don't know his whereabouts currently, but he signed a temporary guardianship agreement in January 2014. The last contact with the mother was when Harmony was nine months old. Petitioners believe she may be living in Missouri at this time. Harmony has five other siblings/half-siblings that are all living with various other relatives. Petitioners plan to enroll her in preschool and need guardianship in order to obtain medical care and vaccines. Court Investigator Jennifer Daniel filed a report on 9-16-14.	Reviewed by: skc Reviewed on: 10-15-14 Updates: Recommendation: File 15 - Milton
<u> </u>]	16POII OII 7-10-14.	15

Walters, Jennifer L. (for Petitioner Wendy Tiner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Aa	e: 14 years		TEMPORARY EXPIRES 10/20/14	NEEDS/PROBLEMS/COMMENTS:
7.9	, Junio			
			WENDY TINER, maternal step-grandmother, is petitioner.	 Need Notice of Hearing. Need proof of personal service of the Notice of Hearing or
Со	nt. from		Father: BRANDON LEBAR	Consent and Waiver of Notice
	Aff.Sub.Wit.			or Declaration of Due
✓	Verified		Mother: AMY TINER	Diligence on: a. Rhonda LeBar (minor)
	Inventory		 Paternal grandfather: Marty LeBar	b. Brandon LeBar (father)
	PTC		Paternal grandmother: Rhonda LeBar –	c. Amy Tiner (mother)
	Not.Cred.		deceased.	, , , ,
	Notice of Hrg	Χ	Maternal grandfather: Lonnie Tiner Maternal grandmother: Theresa Green	Need proof of service of the Notice of Hearing or Consent
	Aff.Mail	Χ	Datition or states no one logo popular di granno	and Waiver of Notice or
	Aff.Pub.		Petitioner states mom has moved around several times and has been plagued with	Declaration of Due Diligence on:
	Sp.Ntc.		drug use. The minor has been removed	a. Marty LeBar (paternal
	Pers.Serv.	Χ	Child Protective Services in other counties	grandfather)
1	Conf.		on a couple of occasions and placed in	b. Lonnie Tlner (maternal
	Screen		foster care. After coming to petitioner's	grandfather) c. Theresa Green (maternal
✓	Letters		home the minor has begged to stay. She does not want to be returned to her mother as she does not attend school regularly, her mother uses drugs and does	grandmother)
✓	Duties/Supp			,
	Objections		not have a stable home.	
	Video			
	Receipt		Court Investigator Charlotte Bien's Report	
✓	CI Report		filed on 10/6/14.	
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 10/15/14
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 16 – Lebar
				1.6

17

Atty

Case No. 14CEPR00761

Willie Benson Earl (Det Succ)

Boyajian, Thomas M. (for Petitioners Carmen Earl and Nichelle Laws)

Petition to Determine Succession to Real Property (Prob. 13151)

DO	D: 1-2-08		CARMEN EARL, Spouse, and	NEEDS/PROBLEMS/COMMENTS:
			NICHELLE LAWS, daughter, are	, , , , , , , , , , , , , , , , , , , ,
			Petitioners.	Continued from 9-29-14. All issues have been cured.
			40 days since DOD	
Со	nt. from 092914	,	,	
	Aff.Sub.Wit.		No other proceedings	
~	Verified			
	Inventory		I&A: \$60,000.00 (real property located at 2370 South Eunice in Fresno)	
	PTC		dr 2370 300111 E0111Ce IITTTesilloj	
	Not.Cred.		Decedent died intestate	
~	Notice of			
	Hrg		Petitioners request Court determination	
~	Aff.Mail	W	that the Decedent's 100% interest in	
	Aff.Pub.		the residence passes to them in 50% undivided interests each.	
	Sp.Ntc.		ondivided interests eden.	
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
_	9202			
Ě	Order			Deviewed by also
	Aff. Posting			Reviewed by: skc
-	Status Rpt UCCJEA			Reviewed on: 10-15-14 Updates:
 	Citation			Recommendation: SUBMITTED
	FTB Notice			File 17 - Earl
<u> </u>	I ID NUICE			THE I/ - EUII

17

Lind, Ruth P (for Noel Steele Williams – Petitioner – Son)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 07/31/2014			NOEL STEELE WILLIAMS, son/named	NEEDS/PROBLEMS/COMMENTS:
			executor without bond, is petitioner.	
			Full IAEA — o.k.	Note: If the petition is granted status hearings will be set as follows:
Со	ont. from Aff.Sub.Wit.		Will dated: 10/20/2006	 Monday, 02/23/2015 at 9:00a.m. in Dept. 303 for the filing
✓	Verified		Residence: Clovis Publication: The Business Journal	of the inventory and appraisal and
	Inventory		1 concerns in a bosiness scorner	
	PTC		Estimated value of the Estate:	• Monday, 01/04/2016 at
	Not.Cred.		Personal property - \$311,000.00	9:00a.m. in Dept. 303 for the filing
✓	Notice of Hrg		Real property - \$144,000.00 Total - \$455,000.00	of the first account and final distribution.
✓	Aff.Mail	w/	Probate Referee: Rick Smith	Pursuant to Local Rule 7.5 if the required
✓	Aff.Pub.			documents are filed 10 days prior to the hearings on the matter the status hearing
	Sp.Ntc.			will come off calendar and no
	Pers.Serv.			appearance will be required.
	Conf.			
	Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 10/15/2014
	UCCJEA			Updates:
	Citation			Recommendation: Submitted
	FTB Notice			File 18 – Williams
				18

Lo, Kaying (pro per Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

The state of the s					
DOD: 5/1/13	KAYING LO was appointed as Executor	NEEDS/PROBLEMS/COMMENTS:			
	with full IAEA authority and without				
	bond on 1/7/14.				
	1	Continued from 8/19/14. Minute			
Cont. from 050914,	Letters issued on 1/7/14.	states no appearances. The court			
062414, 081914	l	removes Kayling Lo and appoints the			
	Inventory and appraisal is now due.	Public Administrator. The Court			
Aff.Sub.Wit.	Attracts Order dated 1/7/14 act this	orders Kayling Lo to be personally			
Verified	Minute Order dated 1/7/14 set this	present and issues and order to show cause with sanctions of \$500.00 for			
Inventory	status hearing for the filing of the	Kayling Lo. – Order to show cause			
PTC	inventory and appraisal.	mailed to Kayling Lo on 8/19/14.			
Not.Cred.					
Notice of	Minute Order dated 5/9/14 states no	1. Need inventory and appraisal <u>or</u>			
Hrg	appearances. The Court orders Kaying	current written status report			
Aff.Mail	Lo to be personally present on 6/24/14.	pursuant to Local Rule 7.5 which			
Aff.Pub.	Copy of the minute order mailed to Kaying Lo on 5/16/14.	states in all matters set for status			
Sp.Ntc.		hearing verified status reports			
Pers.Serv.	Mr. Kayling Lo has not appeared at any of the status hearings.	must be filed no later than 10 days before the hearing. Status			
Conf.	of the status fleatings.	Reports must comply with the			
Screen	Letters of Administration issued to the	applicable code requirements.			
Letters	Public Administrator on 9/9/14.	Notice of the status hearing,			
Duties/Supp		together with a copy of the Status			
Objections		Report shall be served on all			
Video]	necessary parties.			
Receipt					
CI Report					
9202					
Order					
Aff. Posting		Reviewed by: KT			
Status Rpt		Reviewed on: 10/15/14			
UCCJEA		Updates:			
Citation		Recommendation:			
FTB Notice		File 23 - Stratton			
		23			